University of New Hampshire
Carsey School of Public Policy

CARSEY RESEARCH

Regional Issue Brief #65 Summer 2021

# Half of New Hampshire Residents Buy Local Farm Food at Least a Few Times a Month, But Engagement Varies by County

Jess Carson, Analena Bruce, and Isaac Leslie

Using data representative of New Hampshire adults, this brief explores consumers' engagement with local food systems and their perceived access to different retail channels to inform food system stakeholders' planning. Getting local farm food to customers in ways that make financial and logistical sense for both farmers and consumers has long challenged the growth of direct-to-consumer sales. Despite a surge of interest in local foods spurred by the pandemic, there are no contemporary, representative data available to farmers and local food advocates for measuring consumers' engagement with local food systems and specific types of markets. As food producers and advocates dedicate efforts to marketing, infrastructure development, and public engagement efforts, understanding consumers' preference for different types of market outlets is a useful tool for guiding local food system development.

## KEY FINDINGS

- Half of Granite Staters report buying local farm food at least a few times a month, but only 15 percent do so weekly.
- There is substantial variation in frequency of local farm food purchasing across New Hampshire counties, ranging from 2 percent in Coös to 89 percent in Sullivan County, with the greatest engagement along the Vermont border.
- Even during the pandemic, 88 percent of respondents reported that in-person sales models like farm stands and farmers markets were easily accessible sources of local farm products; while 23 percent said online options were easily accessible.

## Half of Granite Staters Buy Local Farm Food at Least a Few Times a Month

Eighty percent of Granite Staters reported purchasing local farm foods in the past year, with 49.7 percent buying at least a few times a month ("occasionally").[1] However, frequency of local farm food purchasing varies widely across the state (Figure 1). Within the state's three urban counties (Hillsborough, Rockingham, and Strafford), between one-third and one-half of adults buy local farm food at least occasionally, compared with a much wider range—from 89 percent in Sullivan County to 2 percent in Coös County—in rural places. Overall, rural Granite Staters are more likely to be at least occasional farm food purchasers, at 61.2 percent versus 42.6 percent in urban places, with the greatest engagement along the Vermont border.[2]

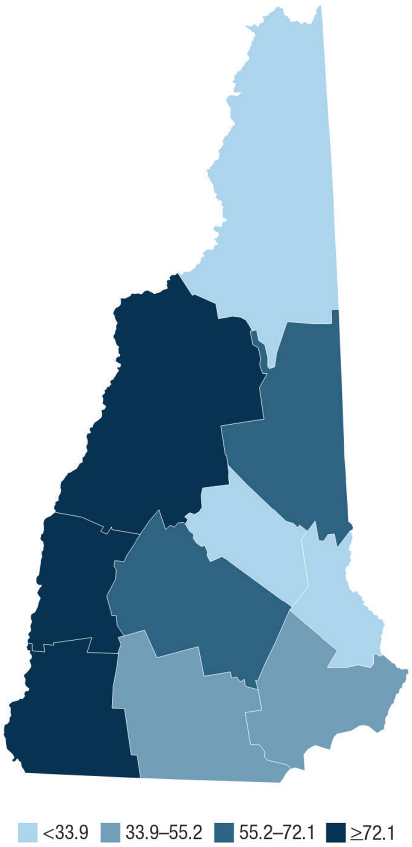
## Traditional Farm Food Sources Seen as Most Available

To identify perceptions of local farm food accessibility, we asked respondents to select from a list of local farm food sales models and to select all that were easily accessible to them (Figure 2).[3] Granite Staters were most likely to report that traditional models like farm stands, brick-and-mortar stores, and farmers markets were easily accessible (each selected by two-thirds to three-quarters of respondents). While there has been an overall rise in online shopping during the pandemic, fewer than one-in-four respondents said that an online market platform for locally produced food was an easily accessible option. On one hand, many online platforms are new, and consumers may not

Huddleston Hall • 73 Main Street • Durham, NH 03824
(603) 862-2821 • carsey.unh.edu

TTY Users: dial 7-1-1 or
1-800-735-2964 (Relay N.H.)

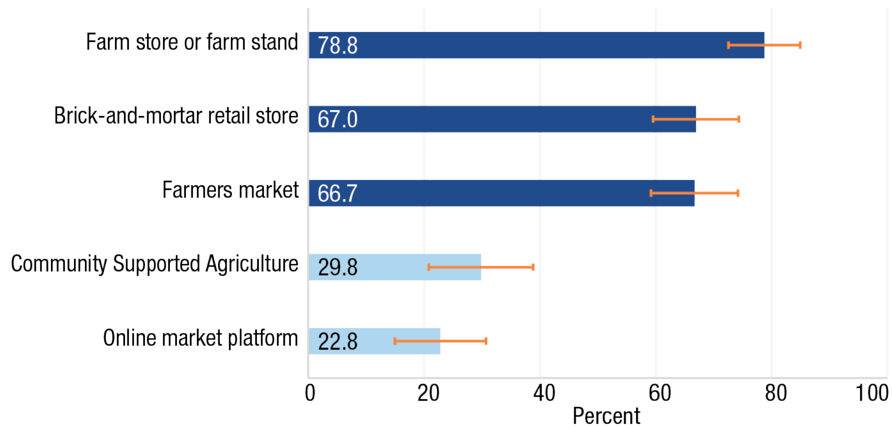
**FIGURE 1. PERCENT OF RESPONDENTS PURCHASING LOCAL FARM FOODS AT LEAST A FEW TIMES PER MONTH**




**Source:** Carsey School of Public Policy analysis of May 2021 Granite State Poll data; n=903.
**Note:** Legend categories represent quartiles.

realize they exist. On the other, that more consumers didn't identify online platforms as easily accessible amid the pandemic's online shopping boom provides an opportunity for additional research on how to better reach consumers with these platforms. Finally, with no baseline data for comparison, it is not possible to compare these estimates with pre-pandemic engagement; for instance, it is possible that even smaller shares of consumers would have said online platforms were an easily accessible option for local farm foods a year or two earlier.

**FIGURE 2. PERCENT OF RESPONDENTS IDENTIFYING EACH OPTION AS "EASILY ACCESSIBLE" FOR BUYING LOCAL FARM FOODS**




**Source:** Carsey School of Public Policy analysis of May 2021 Granite State Poll data; n=903.
**Note:** Respondents could select multiple options; 88.6 percent of respondents selected at least one source. Orange bars represent 95% confidence intervals.

## Opportunities to Widen and Deepen Local Food System Engagement Exist

This brief finds that most New Hampshire residents at least occasionally purchase local farm foods, with clear patterns in which sources are perceived as easily accessible. However, these estimates also indicate that there is significant room to grow consumer engagement. First, one-in-five Granite Staters report "never" purchasing local farm foods, with rates topping 30 percent in Rockingham County. This indicates opportunities for local food advocates to investigate interest levels and potential barriers to engagement within their communities. Second, although high shares of Granite Staters at least occasionally purchase local farm foods, only 14.8 percent do so at least once per week. Further, these data only capture frequency of shopping and not volume of sales, meaning that additional work remains to disaggregate invested shoppers from those who purchase only an item or two.

Although lower shares of New Hampshire residents identified community supported agriculture (CSA) and online platforms as easily accessible, these data cannot specify why. For instance, it is possible that people are not aware of these options, and thus do not find them "accessible." It is also possible that consumers feel less knowledgeable about those models' operation and thus perceive their access is not "easy." Regardless, identifying how to engage consumers both more widely and deeply can generate greater income for New Hampshire food producers and more local food for New Hampshire consumers.

Finally, while these data showed substantial variation in local food system engagement by geography, capacity for detailed demographic analysis was limited. For instance, three characteristics that may be of particular relevance to food acquisition decisions—race, ethnicity, and income—were not reliably available for analysis here. Specifically, this survey did not oversample Granite Staters of color, and respondents were overwhelmingly white (93 percent), precluding analysis by race or ethnicity. And of those who did participate in the survey, nearly one-quarter did not report income data, resulting in limited utility of this measure for the entire sample. Future research that focuses specifically on demographic, economic, and cultural variations in local food system engagement among larger random samples of consumers are especially warranted. Beyond documenting simple variation, this type of work could provide actionable insights for food producers and advocates, especially for deepening reach to consumers who perceive social or cultural barriers, such as feeling unwelcome or not identifying with the type of people who buy local farm foods.

## Data & Methods

This brief uses data from the May 2021 Granite State Poll, a web-based survey of Granite State Panel members who are recruited from randomly-selected landline and cell phone numbers across New Hampshire. The panel only includes people age 18 or older and people who are New Hampshire residents or seasonal residents who are registered to vote in New Hampshire. For more about the panel, see https://cola.unh.edu/unh-survey-center/projects/granite-state-panel.

The May 2021 panel included 933 respondents, although due to missing values on key variables, analyses here are restricted to a sample of 903. All differences presented in text are statistically significant ($p<0.05$). Because these data are derived from a sample, estimates are subject to sample-based error and caution should be used in making additional comparisons between estimates, for differences may appear but not be statistically significant.

## Endnotes

1. It is important to note that with very few sources of statewide, representative data sources available, it is difficult to offer a pre-pandemic comparison point. However, the February 2017 wave of the Granite State Poll included some questions on farmers market engagement, related to work by the New Hampshire Department of Agriculture, Markets, and Food; UNH Department of Natural Resources & the Environment; UNH Cooperative Extension, and the NH Farmers Market Association found that 84 percent of New Hampshire residents had "ever" shopped at a farmers market (n=513). See https://extension.unh.edu/resource/farmers-market-consumers-new-hampshire for more details.

2. It is not clear why engagement is highest in this part of the state. Review of earlier work (2019) suggests that farm food retail sources are not especially prevalent in this region (https://carsey.unh.edu/publication/mapping-food-landscape-NH), suggesting geographic concentration of local farm food sources may not be the sole explanation. Analysis of U.S. Census Bureau data (American Community Survey, 2019 5-year estimates; available upon request) suggests that these counties are not uniformly better resourced either in terms of median household income or the share of household with access to a vehicle. It is possible that local food culture, advocacy, or other engagement tools may be more prevalent here, or result from inter-state spillover: Vermont consistently ranks highest in per-capita direct sales of farm foods to consumers (e.g., https://www.strollingoftheheifers.com/locavore/).

3. Survey respondents were asked "Which options (if any) for buying local farm foods are easily available to you, whether you've used them or not?" and told to select all options that applied. Available options included (1) farm store or farm stand; (2) farmers market; (3) Community Supported Agriculture (CSA); (4) online market platform; (5) brick-and-mortar retail store; (6) other (please specify); (7) no options easily available; and (8) don't know. We did not provide additional definitions or examples, and it is possible that respondents may have been unfamiliar with some options, like a CSA (an arrangement in which a farmer offers a certain number of "shares" for sale, with customers typically paying an initial lump sum in exchange for weekly allotments of seasonal produce throughout the growing season).

## About the Authors

**Jess Carson**, Ph.D., is a research assistant professor with the Vulnerable Families Research Program at the Carsey School of Public Policy. Since joining Carsey in 2010, she has studied poverty, work, and the social safety net, including policies and programs that support low-income workers like affordable health insurance, food assistance programs, and quality child care.

**Analena Bruce**, Ph.D., is the Principal Investigator in the UNH Food Systems Lab and an Assistant Professor in the Department of Agriculture, Nutrition, and Food Systems at the University of New Hampshire. She is a sociologist with a research focus on farmers and consumers' participation in Alternative Food Networks, or relationship-based market models rooted in values such as environmental sustainability, social justice, and community economic development. She also has a line of research on public engagement with regulatory policy that governs science and technology in the food system.

**Isaac ("Ike") Sohn Leslie,** Ph.D., researches pathways for building food systems that prioritize justice and sustainability. Ike co-authored the sixth edition of *An Invitation to Environmental Sociology* and has published in *Rural Sociology, Society & Natural Resources, Agriculture and Human Values, Agroecology and Sustainable Food Systems,* and the *Handbook of the Sociology of Racial and Ethnic Relations*, with support from the Fulbright Program and the Rural Sociological Society, among others. Ike is currently a Postdoctoral Research Associate in Food Systems at the University of New Hampshire. For more, visit isaacleslie.com.

## Acknowledgments

The research presented in this brief was seeded through an Interdisciplinary Working Group (IWG) convened through a grant under the University of New Hampshire Collaborative Research Excellence (CoRE) Initiative. The IWG, called the Food & Climate Research Network, has provided helpful guidance to the authors here, and the authors would especially like to acknowledge support from Erin Hale (NH Food Alliance), Jennifer Wilhelm (Fat Peach Farm), Semra Aytur (Department of Health Management and Policy), and Larry Hamilton (Department of Sociology). Funds for including questions on the Granite State Poll were provided by the CoRE initiative grant and supplemented by the NH Food Alliance. The authors also thank Carsey School colleagues Michael Ettlinger for his feedback on an earlier draft, Laurel Lloyd for layout and production, and Nick Gosling for digital media support.

University of New Hampshire
Carsey School of Public Policy

The Carsey School of Public Policy at the University of New Hampshire is nationally recognized for its research, policy education, and engagement. The school takes on the pressing issues of the twenty-first century, striving for innovative, responsive, and equitable solutions.

Huddleston Hall • 73 Main Street • Durham, NH 03824
(603) 862-2821
TTY Users: dial 7-1-1 or 1-800-735-2964 (Relay N.H.)
**carsey.unh.edu**